

Department Name: Housing Finance Authority

Reporting Period: 03/31/04
March 31, 2004

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Departmental Quarterly Performance Report
Department Name: HOUSING FINANCE AUTHORITY
Reporting Period: December 31, 2003

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OF THE YEAR AT DIFFERENT TIMES AND LOCATIONS FOR COUNTY EMPLOYEES TO ATTEND. THE AUTHORITY ALSO PROVIDED 4 SIMILAR WORKSHOPS DURING THE EVENING AND WEEKENDS FOR THE CAA AND OMEGA HOMEBUYER CLUBS. County Mgr. Priority (Circle One): People Service Technology Fiscal Responsibility THE AUTHORITY WILL CONTINUE TO DEVELOP THE ANTI- PREDATORY LENDING INITIATIVE WITH LOCAL AGENCIES AND THE COUNTY COMMISSION OFFICE. THIS IS AN ONGOING PROGRAM. ECC Project Workforce Dev. ECC Project Workforce Dev. ECC Project Audit Response Other Customer Service Workforce Dev. ECC Project Audit Response Other	HOME. THE AUTHORITY HAS HELD 3 SESSIONS FOR THE FIRST HALF	Customer Service
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COUNTY COMMISSION OFFICE. THIS IS AN ONGOING PROGRAM. — Customer Service — Workforce Dev. — ECC Project — Audit Response — Other		1 — —
Workforce Dev. ECC Project Audit Response Other		·
ECC Project Audit Response Other	COUNTY COMMISSION OFFICE. THIS IS AN ONGOING PROGRAM.	l —
Audit Response Other		1
Other		
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Departmental Quarterly Performance Report
Department Name: HOUSING FINANCE AUTHORITY
Reporting Period: December 31, 2003

County Mgr. Priority (Circle One): People Service Technology Fiscal Responsibility	Strategic Plan
THE AUTHORITY DEVELOPED ANOTHER HOMEOWNERSHIP	X Business Plan
OPPORTUNITY TO PROVIDE ASSISTANCE WITH DOWNPAYMENT AND	Budgeted Priorities
CLOSING COSTS THROUGH THE INDIVIDUAL DEVELOPMENT	Customer Service
ACCOUNT (IDA) PROGRAM. CURRENTLY THERE ARE 89 ACTIVE	Workforce Dev.
ACCOUNTS AND SINCE INCEPTION, 49 FAMILIES HAVE PURCHASED	ECC Project
HOMES USING FUNDS FROM THEIR IDA ACCOUNT WITH MATCHING	Audit Response
	Other
FUNDS.	(Describe)
County Mgr. Priority (Circle One): People Service Technology Fiscal Responsibility	Strategic Plan
THE AUTHORITY PERFORMED 11 AUDITS OF MUTLIFAMILY	_X_Business Plan
DEVELOPMENTS TO ENSURE COMPLIANCE WITH BOND DOCUMENTS.	Budgeted Priorities
	Customer Service
	Workforce Dev.
	ECC Project
	Audit Response
	Other
	(Describe)
County Mor Priority (Circle One) (People) Service Technology Fiscal Responsibility	Cturto =: a DI
County Mgr. Priority (Circle One). People Service Technology Fiscal Responsibility UNDER THE AUTHORITY'S HOME 2003 ALLOCATION 13 LOANS	Strategic Plan
UNDER THE AUTHORITY'S HOME 2003 ALLOCATION, 13 LOANS	X_Business Plan
UNDER THE AUTHORITY'S HOME 2003 ALLOCATION, 13 LOANS WERE CLOSED FOR A TOTAL OF \$733,618. THESE WERE FIRST TIME	X_Business Plan Budgeted Priorities
UNDER THE AUTHORITY'S HOME 2003 ALLOCATION, 13 LOANS WERE CLOSED FOR A TOTAL OF \$733,618. THESE WERE FIRST TIME HOMEBUYERS WHOSE INCOME DID NOT EXCEED 65% OF MEDIAN	X_Business Plan Budgeted Priorities Customer Service
UNDER THE AUTHORITY'S HOME 2003 ALLOCATION, 13 LOANS WERE CLOSED FOR A TOTAL OF \$733,618. THESE WERE FIRST TIME	X_Business Plan Budgeted Priorities Customer Service Workforce Dev.
UNDER THE AUTHORITY'S HOME 2003 ALLOCATION, 13 LOANS WERE CLOSED FOR A TOTAL OF \$733,618. THESE WERE FIRST TIME HOMEBUYERS WHOSE INCOME DID NOT EXCEED 65% OF MEDIAN	X_Business Plan Budgeted Priorities Customer Service Workforce Dev. ECC Project
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UNDER THE AUTHORITY'S HOME 2003 ALLOCATION, 13 LOANS WERE CLOSED FOR A TOTAL OF \$733,618. THESE WERE FIRST TIME HOMEBUYERS WHOSE INCOME DID NOT EXCEED 65% OF MEDIAN	X_Business Plan Budgeted Priorities Customer Service Workforce Dev. ECC Project Audit Response Other
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UNDER THE AUTHORITY'S HOME 2003 ALLOCATION, 13 LOANS WERE CLOSED FOR A TOTAL OF \$733,618. THESE WERE FIRST TIME HOMEBUYERS WHOSE INCOME DID NOT EXCEED 65% OF MEDIAN INCOME FOR MIAMI-DADE COUNTY. County Mgr. Priority (Circle One): People Service Technology Fiscal Responsibility THE AUTHORITY IS CURRENTLY REVIEWING 3 NEW PROJECTS FOR	X_Business Plan Budgeted Priorities Customer Service Workforce Dev. ECC Project Audit Response Other Describe X_Business Plan
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UNDER THE AUTHORITY'S HOME 2003 ALLOCATION, 13 LOANS WERE CLOSED FOR A TOTAL OF \$733,618. THESE WERE FIRST TIME HOMEBUYERS WHOSE INCOME DID NOT EXCEED 65% OF MEDIAN INCOME FOR MIAMI-DADE COUNTY. County Mgr. Priority (Circle One): People Service Technology Fiscal Responsibility THE AUTHORITY IS CURRENTLY REVIEWING 3 NEW PROJECTS FOR THE AMERICAN COMMUNITY FUND LOAN PILOT PROGRAM. THE 3 PROGRAMS ARE CAPITAL LOFTS IN DOWNTOWN MIAMI; RICHMOND HEIGHTS CDC FOR REHAB OF SINGLE FAMILY HOMES; URBAN	X_Business Plan Budgeted Priorities Customer Service Workforce Dev. ECC Project Audit Response Other (Describe) Strategic Plan X_Business Plan Budgeted Priorities Customer Service
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UNDER THE AUTHORITY'S HOME 2003 ALLOCATION, 13 LOANS WERE CLOSED FOR A TOTAL OF \$733,618. THESE WERE FIRST TIME HOMEBUYERS WHOSE INCOME DID NOT EXCEED 65% OF MEDIAN INCOME FOR MIAMI-DADE COUNTY. County Mgr. Priority (Circle One): People Service Technology Fiscal Responsibility THE AUTHORITY IS CURRENTLY REVIEWING 3 NEW PROJECTS FOR THE AMERICAN COMMUNITY FUND LOAN PILOT PROGRAM. THE 3 PROGRAMS ARE CAPITAL LOFTS IN DOWNTOWN MIAMI; RICHMOND HEIGHTS CDC FOR REHAB OF SINGLE FAMILY HOMES; URBAN	X_Business Plan Budgeted Priorities Customer Service Workforce Dev. ECC Project Audit Response Other (Describe) Strategic Plan X_Business Plan Budgeted Priorities Customer Service Workforce Dev. ECC Project

Department Name: HOUSING FINANCE AUTHORITY

Reporting Period: December 31, 2003

PERSONNEL SUMMARY

A. Filled/Vacancy Report

: :	Filled as of September 30 of Prior Year	Current Year Budget	Actual Number of Filled and Vacant positions at the end of each quarter							
NUMBER			Quarter 1		Quarter 2		Quarter 3		Quarter 4	
OF FULL-TIME	1 Cai	Duager	Filled	Vacant	Filled	Vacant	Filled	Vacant	Filled	Vacant
POSITIONS*	9	9	9	0	9	0				

^{*} Public Safety Departments should report the sworn versus non-sworn personnel separately and Departments with significant parttime, temporary or seasonal help should report these separately.

Notes:

B. Key Vacancies
None

C. Turnover Issues
None

D. Skill/Hiring Issues
None

E. Part-time, Temporary and Seasonal Personnel (Including the number of temporaries long-term with the Department)

We have one Temp providing clerical assistance to our single family programs including our homebuyer clubs and workshops. She is the only Creole speaking person in our office and therefore is able to assist us in communicating with our Haitian residents and clients.

F. Other Issues

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Department Name: HOUSING FINANCE AUTHORITY

Reporting Period: December 31, 2003

FINANCIAL SUMMARY

(All Dollars in Thousands)

	is in Thousan	CURRENT FISCAL YEAR							
	PRIOR		Quai	rter	Year-to-date				
	YEAR Actual	Total Annual Budget	Budget	Actual	Budget	Actual	\$ Variance	% of Annual Budget	
Revenues	*********		Dungor	Hopan	Daugos	1200001	o (arrance		
Multifamily	1,261	1,030	258	278	516	472	44	46	
Singlefamily	5,448	310	78	4	156	18	138	6	
Interest	1,070	1,000	250	301	500	502	-2	51	
Grant	330	380	95	4	190	44	146	12	
Misc.	78	15	3	19	6	22	-16	147	
Cash Carryover	0	0	0	0	0	0	0	0	
Total	8,187	2,735	685	606	1,368	1,058	310	39	
Expense*									
Personnel	887	926	232	232	464	459	5	50	
Operating	4,908	2,039	510	294	1,020	542	478	27	
Capital	26	23	6	0	12	0	12	0	
Total	5,821	2988	748	526	1496	1001	495	34	

^{*} Expenditures may be reported by activity as contained in your budget or may be reported by category (personnel, operating and capital).

Equity in pooled cash (for proprietary funds only)

Fund/		Projected at Year-end as of						
Subfund	Prior Year	Quarter 1	Quarter 2	Quarter 3	Quarter 4			
	836,137	788,983	851,153					
			*					
	i							
Total	836,137	788,983	851,153					

Comments:

(Explain variances, discuss significant in-kind services, provide status of aged receivables at 30-60-90-+ days and those scheduled for write-off, if applicable)

Single family fees are normally collected in April and Oct of each year. Those fees collected in October 2003 have been accrued as revenues as of September 30, and therefore are not recorded as revenues when actually collected; they are a reduction of a receivable.

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Department Name: HOUSING FINANCE AUTHORITY

Reporting Period: December 31, 2003

STATEMENT OF PROJECTION AND OUTLOOK

The Department projects to be within authorized budgeted expenditures and projects that available revenues will exceed expenses except as noted below:

Notes and Issues:

(Summarize any concern or exception which will prohibit the Department from being within authorized budgeted expenditures and available revenues)

The Authority is currently partnering with a local developer to develop affordable housing in downtown Miami. The developer has requested that the Authority provide collateral to secure a construction loan with Wachovia Bank. The proceeds for the collateral are three of the \$1 million notes that are owed to the Authority by the Housing Agency.

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Department Name: HOUSING FINANCE AUTHORITY

Reporting Period: December 31, 2003

DEPARTMENT DIRECTOR REVIEW

The Department Director has reviewed this report in its entirety and agrees with all information presented including the statement of projection and outlook.

Signature

Department Director

Date April 14, 2004